



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1 July 2023 Period start date To 30 June 2024 Period end date

Charity name: The Robert Winstanley Trust

Charity registration number: 1182229

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>1. (a) to advance the mission of the Church of All Saints, Loughton, Milton Keynes which is part of the Watling Valley Ecumenical Partnership</p> <p>2. (b) to preserve, repair, maintain, improve, upkeep, beautify and restore All Saints Church Loughton, Milton Keynes and the churchyard affixing the church and of any monument, fitting, fixture, stained glass, furniture, ornament, organ bell, bell fittings, or chattel in the church or churchyard</p> <p>3. (c) For any ecclesiastical purpose within the meaning of the Parochial Church Councils (Powers) Measure 1956 as amended affecting the said Church or any part thereof.</p>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	The Trustees continued to meet regularly to monitor investments and assess any grant requests.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Guidance on Public Benefit Reporting, issued by the Charity Commission, has been read to ensure this report is created and aligns with that guidance. Guidance on accounting preparation is reviewed before annual accounts are completed, to ensure changes in the Charities Act are complied with.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	Distribution of investment income is by grants, except in extremis. Grants are for the furtherance of mission of All Saints' Church.

Policy on social investment including program related investment	Para 1.38	There is no social investment.
Contribution made by volunteers	Para 1.38	
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	Grants were made to All Saints' church for lawnmower and trees, ensuring the safety of anyone attending the church building and grounds.

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance	Para 1.41	

against objectives		
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	At the end of the period, the Trust had Net Assets of £605,222. This included a gain on investments of £67,423.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	
Amount of reserves held	Para 1.22	0
Reasons for holding zero reserves	Para 1.22	The Robert Winstanley Trust is a small charity with a narrow focus. The investment policy is to retain investments for income purposes. In extremis the investments can be realised and distributed. In such circumstances the Trustees would consider the value of investment to be retained.
Details of fund materially in deficit	Para 1.24	N/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	There are no uncertainties.

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Funding comes from receipt of dividends from investments held.
Investment policy and objectives including any social investment policy adopted	Para 1.46	N/a
A description of the principal risks facing the charity	Para 1.46	N/a
Other		N/a

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Trust deed
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	4 Ex officio trustees 2 trustees nominated by All Saints' Church, Loughton 1 Trustee nominated by the Watling Valley Ecumenical Partnership

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	N/a
The charity's organisational structure and any wider network with which the charity works	Para 1.51	N/a
Relationship with any related parties	Para 1.51	N/a
Other		N/a

Reference and Administrative details

Charity name	The Robert Winstanley Trust
Other name the charity uses	
Registered charity number	118229
Charity's principal address	c/o 7 Lucy Lane, Loughton, Milton Keynes, MK5 8EP

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	<i>Mike Morris</i>	<i>Chair</i>		<i>Ex Officio</i>
2	<i>David Thom</i>			<i>Ex Officio</i>
3	<i>John Rowcroft-James</i>			<i>Ex Officio</i>
4	<i>Rozi Rowcroft James</i>	<i>Treasurer</i>		<i>Ex Officio</i>
5	<i>Shalmali Job</i>	Clerk		<i>All Saints' Church, Loughton</i>
6	Julian Drury		11 July 2023	Watling Valley Ecumenical Partnership
7	<i>Gary Reading</i>			<i>All Saints' Church, Loughton</i>
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	N/a	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	N/a	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/a	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
N/a		

Name of chief executive or names of senior staff members (Optional information)

--

Exemptions from disclosure

Reason for non-disclosure of key personnel details

N/a

Other optional information

N/a

Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

Mike Morris

Rozi Rowcroft James

Full name(s)

Michael James Morris

*Rosemary Helen Parry
Rowcroft James*

**Position (eg Secretary,
Chair, etc)**

Chair

Treasurer

Date

23/04/2025



CHARITY COMMISSION
FOR ENGLAND AND WALES

The Robert Winstanley Trust

1182229

Receipts and payments accounts

CC16a

For the period
from

01/07/2023

To

30/06/2024

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Investment Income	29,770	-	-	29,770	25,994
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	29,770	-	-	29,770	25,994
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	29,770	-	-	29,770	25,994
A3 Payments					
Grants Made	7,033	-	-	7,033	-
Bank charges	84	-	-	84	84
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	7,117	-	-	7,117	84
A4 Asset and investment purchases. (see table)					
Purchase of assets	30,000	-	-	30,000	-
	-	-	-	-	-
Sub total	30,000	-	-	30,000	-
Total payments	37,117	-	-	37,117	84
Net of receipts/(payments)	- 7,347	-	-	- 7,347	25,910
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	- 7,347	-	-	- 7,347	25,910

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bank Account	41,010	-	-
		-	-	-
		-	-	-
	Total cash funds	41,010	-	-
	(agree balances with receipts and payments account(s)).	Agreement Error	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	Investment funds	Charibond	-	135,669
	Investment funds	Charifund	-	428,535
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	



CHARITY COMMISSION
FOR ENGLAND AND WALES

The

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees

Charity Name
The Robert Winstanley Trust

On accounts for the year ended

30 June 2024

Charity no
(if any)

1182229

Set out on pages

1-2

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended DD / MM / YYYY.

Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below *) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

* Please delete the words in the brackets if they do not apply.

Signed:

Lindsay O'Kane

Date:

20/4/2025

Name:

LINDSAY O'KANE

Relevant professional

CHARTERED ACCOUNTANT

qualification(s) or body
(if any):

Address:

7 CATESBY CROFT / LOUGHTON
MILTON KEYNES
MK5 8FH.

Section B

Disclosure

Only complete if the examiner needs to highlight material matters of concern
(see CC32, Independent examination of charity accounts: directions and
guidance for examiners).

Give here brief details of
any items that the
examiner wishes to
disclose.

I have completed my examination. I confirm that no material matters have
come to my attention in connection with the examination (other than those
disclosed below *) which gives me cause to believe that in any material
respect:

- the accounting records were not kept in accordance with section 139
of the Charities Act, or
- the accounts did not accord with the reporting records, or
- the accounts did not comply with the applicable requirements
concerning the form and content of accounts set out in the Charities
(Accounts and Reports) Regulations 2008 other than any requirement
that the accounts give a true and fair view which is not a matter
considered as part of an independent examination.

I have no concerns and have come across no other matters in connection
with the examination to which attention should be drawn in my report in
order to enable a proper understanding of the accounts to be reached.

Please delete the words in the brackets if they do not apply.